# SMARTSystem Management Training Series

## Training Session #2 – SMARTSystem Menus, Staff Entry and Security

**Purpose:** To provide an overview of each SMARTSystem Main Menu, Sub-menus, Staff permissions and Security.

**Keywords:** The following is a list of key terms used in the SMART System that you should be familiar with and understand.

For example, to standardize information in the SMARTSystem we utilize **pre-requisites**. A **Pre-requisite** is required prior to the entering of some other data. For example, a salesperson (staff entry) is needed prior to entering customers.

Here are some other keywords to review and become familiar with:

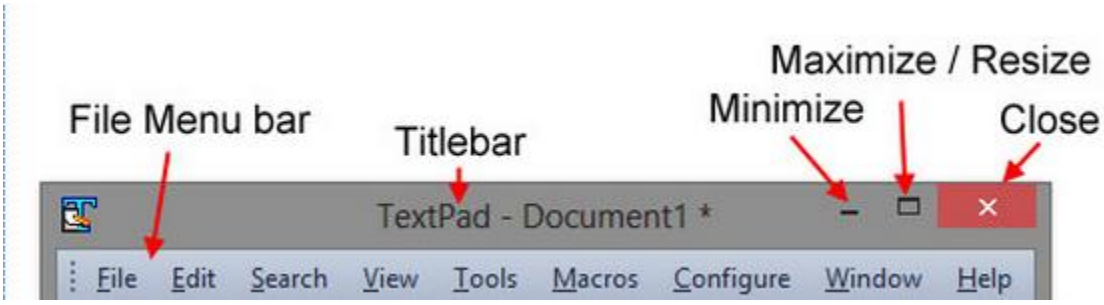
- **Menu** – A list primary options.
- **Sub-menu –** A list of options available under a Main Menu.
- **Table** – Refers to data (pieces of information) arranged in rows and columns, as in a spreadsheet. In the SMARTSystem all information is stored in the form of tables.
- **Spreadsheet** – Is a table of values arranged in rows and columns, like an Excel spreadsheet.
- **Columns** – a column is a vertical line of characters from the top to the bottom of the screen
- **Rows** – a row is a horizontal line containing a series of fields placed next to each other.
- **Database** – An organized collection of data.
- **Data** – The quantities, characters, numbers and symbols that are entered, stored and used in the computer.
- **POS** – Point of Sale
- **SQL (Structured Query Language) –** is a program responsible for managing the SMARTSystem information in the database.
- **View –** a term used in the SMARTSystem to be able to see and select information.
- **System Control** – a specific table that stores information used to configure and save your Company information in the SMARTSystem**.**

## Training Procedure for this Training Session:

- Introduction to Terminology
- Go through the menus across the top of the screen
- Select each Main Menu
- Go over the sub-menus below each Main Menu
- Proceed to the next menu
- Do Staff Entry, Permissions and set Security

## Introduction to Windows Terminology:

The Microsoft Windows terminology for the window itself is illustrated below:




## SMARTSystem Title Bar & Menu Bar:

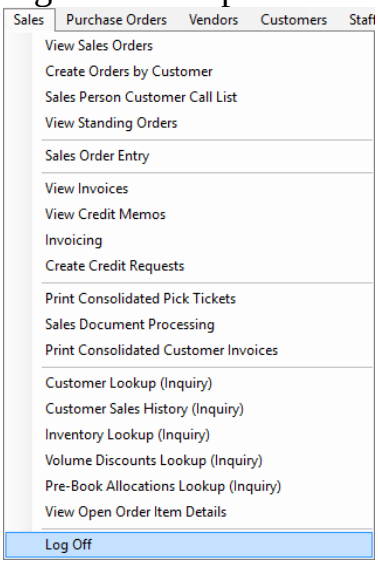
The blue bar across the top of the screen is called the TITLE Bar. It provides information at the top of the window identifying the SMARTSystem program name, Version number as shown above "Version 6.7.4.7" and the name of the Workstation you are on. When your local network environment is all 64 Bit computers the "64 Bit Mode Enabled" is shown. This information is used to Support and tells us which version of the program is running and what PC it is running on.

The MENU Bar above shows the main Menu items that you can access for functions within the SMARTSystem program and these main Menu items can be restricted based on a user login established for each STAFF member.

Main Menu items include:

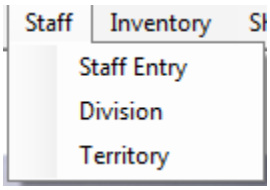
- File
- Sales
- Purchase Orders
- Vendors
- Customers
- Staff
- Inventory
- Shipping
- Reports
- Management
- End-of-Day
- POS
- Drivers
- Control Info
- Help

Selecting each main Menu item will display their related sub-menus. The following is an example of Sub-menus under the Main menu item SALES:

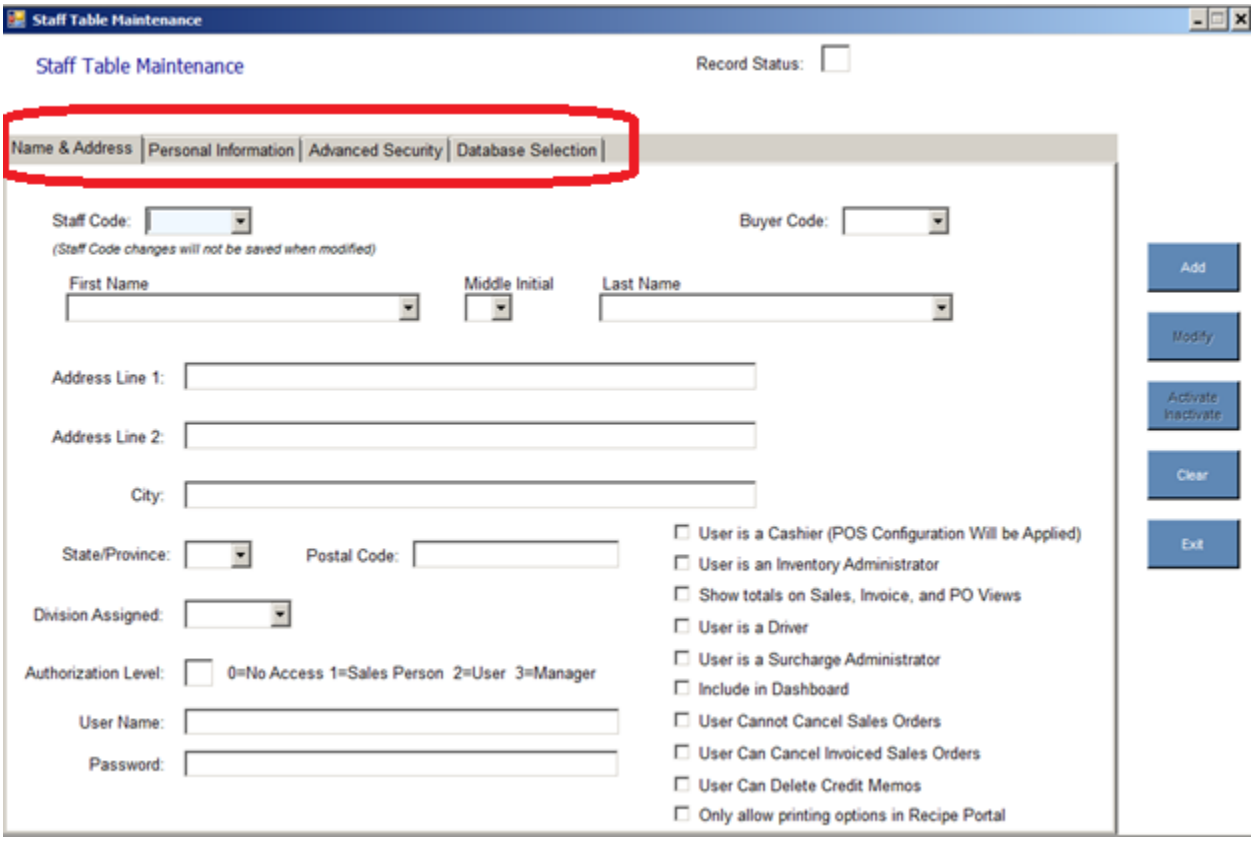


## Staff Menu:

Selecting the Staff Menu provides for the entry and maintenance of your Company staff information and access to related menu items:




Selecting "Staff Entry" provides for the creation and maintenance of user information for the SMARTSystem. The Staff Table Maintenance screen will be displayed showing 4 tabs: Name & Address, Personal Information, Advanced Security and Database Selection.



Name and Address Tab:

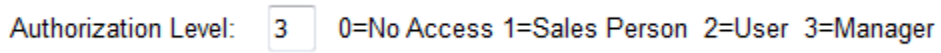
The Name and Address Tab contains important information and will give certain permissions to your staff.

To begin, the Staff Code can be any 5-character code or employee number. Frequently, the first few characters of the person's first name are used.

If you do not want to enter the persons address information, just enter a period "." in the Address Line 1 and City fields. Address Line 2 is optional.

The Division Assigned has been pre-defined for you and it can modify by you. Additions or changes are made to this list by selecting the Division sub-menu under the Staff Menu. This information is required to show what area the person is working. It will not have impact on any SMARTSystem operations.

Each Staff member has an Authorization Level:




There are 4 Global Authorization Levels that function as follows:

- **0=No Access** is used when someone is terminated, but their information may be referred to when accessing history information.
- **1=Sales Person** limits a sales person to only their customers and with other restrictions. This Authorization Level restricts access to customer accounts assigned to other sales staff.
- **2=User** is the normal option which automatically restricts access to the following menus:
    - STAFF and
    - CONTROL INFO and

- Any restrictions are established using the Advanced Security Tab.

- **3=Manager** provides total access to all menus and restrictions are established using the Advanced Security Tab.

For each Staff member, you need to set a User Name and Password for them to log into the SMARTSystem. Neither entry is case sensitive,

User Name: demo1

Password: *******

Additional staff permission options are:

- ☐ User is a Cashier (POS Configuration Will be Applied)
- ☐ User is an Inventory Administrator
- ☐ Show totals on Sales, Invoice, and PO Views
- ☐ User is a Driver
- ☐ User is a Surcharge Administrator
- ☐ Include in Dashboard
- ☐ User Cannot Cancel Sales Orders
- ☐ User Can Cancel Invoiced Sales Orders
- ☐ User Can Delete Credit Memos
- ☐ Only allow printing options in Recipe Portal

- User is a Cashier (POS Configuration Will be Applied)

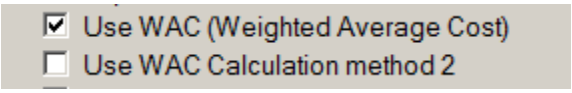
  For a User to have the POS Main Menu, a SMARTSystem configuration on the PC used for Point of Sale (POS PC) is required. Refer to Training Session #5B for additional information and setup.

  In addition, the Staff Login needs to have this checkbox set to utilize all of the POS features when this person signs onto the POS PC.

- **User is an Inventory Administrator**

When the SMARTSystem is set for Weighted Average Cost (WAC), then this option applies.

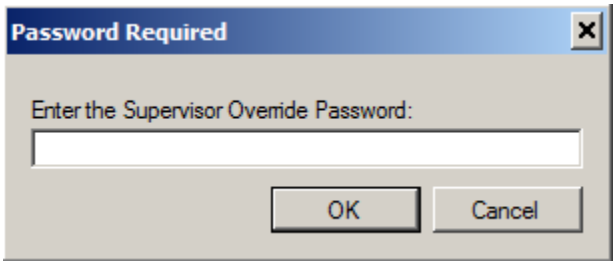
Control Info > System Control > Options



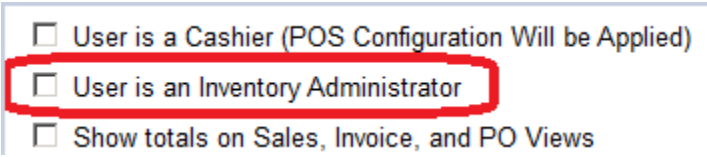

The SMARTSystem will prevent any User from changing inventory costs:

- Current Landed Cost or
- Average Landed Costs

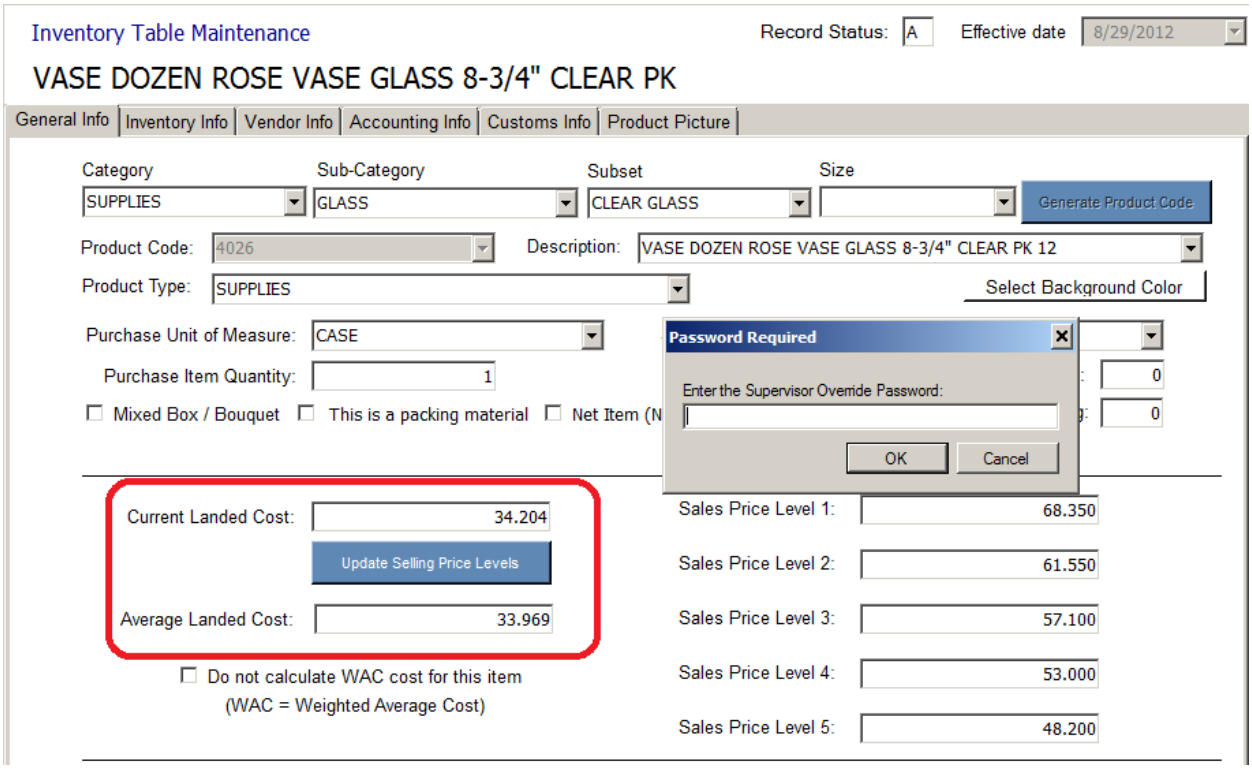
without a password.




When a User has this check box set they are authorized and do not have to enter a password.

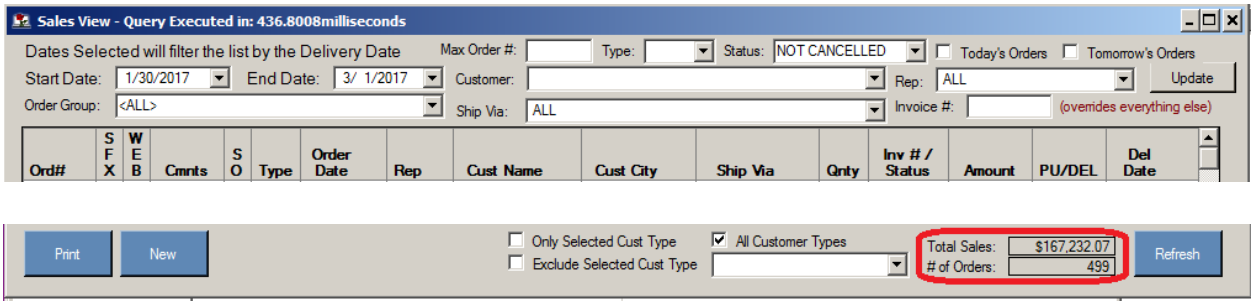



Here is what the screen will look like when prompted for a password:




- **Show totals on Sales, Invoice and PO Views**

The Total Sales, in the lower right corner of these screens is available for all Users or only selected Users. For example on the Sales view:



In System Control, you can "Hide Totals on Sales Views" for all Users by checking this box. Access to this box using menus:

Control Info > System Control > Options

☐ Hide Totals on Sales Views

Therefore, some Users with authorization can override this "Hide" option and view the Totals.

- **User is a Driver**

The "Driver Check-in" feature is used by delivery drivers to check in their work on a daily basis after completing a route. Display this Main menu by unchecking this option:

Control Info > System Control > Sales Options > Hide/Show Options

☑ Hide Driver Menu
(Warning: Configuration Required when Driver Menu is Shown)

- **User is a Surcharge Administrator**

A password is required to change a Customer Surcharge. A User can be assigned responsibility to change customer surcharges and by checking this box in their staff record they will not be required to enter a password:

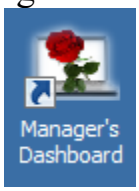
☑ User is a Surcharge Administrator

This checkbox, on the second tab "Sales Info" in the Customer table sets Surcharges by customer.

Unlock Surcharge ☐ Apply Surcharge

- **Include in Dashboard**

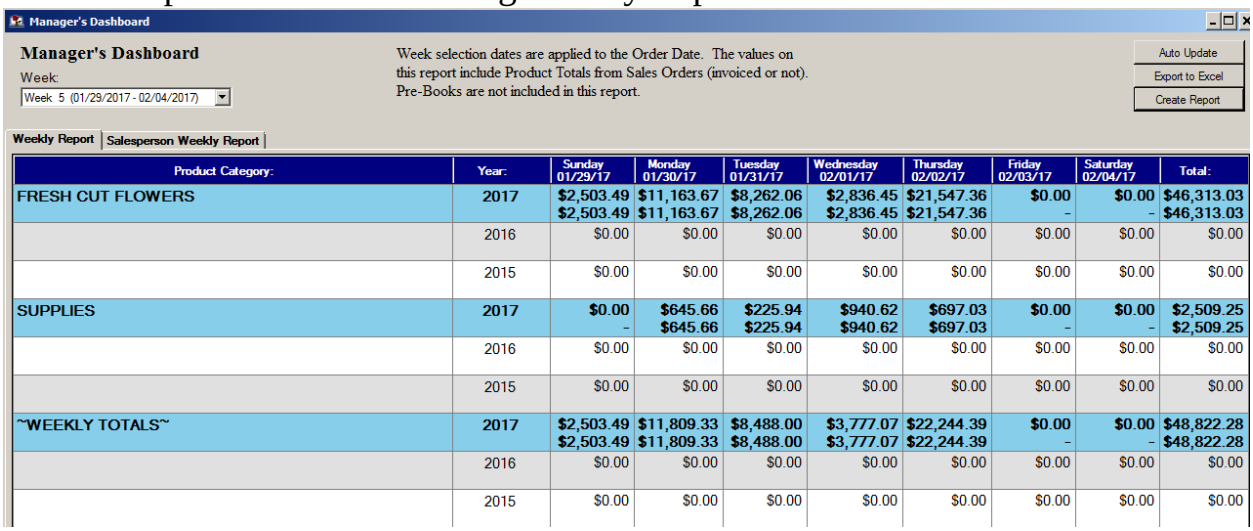
The Manager's Dashboard is a software module to keep owners and managers updated on today's sales activity. A separate icon will appear on your desktop to select the Manager's Dashboard program:




Checking this box will include the User in the Dashboard statistics:

☑ Include in Dashboard

Sample Dashboard showing Weekly Report:



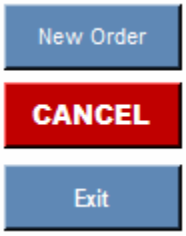

| Product Category: | Year: | Sunday 01/29/17 | Monday 01/30/17 | Tuesday 01/31/17 | Wednesday 02/01/17 | Thursday 02/02/17 | Friday 02/03/17 | Saturday 02/04/17 | Total: |
|---|---|---|---|---|---|---|---|---|---|
| FRESH CUT FLOWERS | 2017 | $2,503.49<br>$2,503.49 | $11,163.67<br>$11,163.67 | $8,262.06<br>$8,262.06 | $2,836.45<br>$2,836.45 | $21,547.36<br>$21,547.36 | $0.00<br>- | $0.00<br>- | $46,313.03<br>$46,313.03 |
| | 2016 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| | 2015 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| SUPPLIES | 2017 | $0.00<br>- | $645.66<br>$645.66 | $225.94<br>$225.94 | $940.62<br>$940.62 | $697.03<br>$697.03 | $0.00<br>- | $0.00<br>- | $2,509.25<br>$2,509.25 |
| | 2016 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| | 2015 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| ~WEEKLY TOTALS~ | 2017 | $2,503.49<br>$2,503.49 | $11,809.33<br>$11,809.33 | $8,488.00<br>$8,488.00 | $3,777.07<br>$3,777.07 | $22,244.39<br>$22,244.39 | $0.00<br>- | $0.00<br>- | $48,822.28<br>$48,822.28 |
| | 2016 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| | 2015 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |

- **User Cannot Cancel Sales Orders**

When this option has been set, Sales Orders not Invoiced can be CANCELLED:

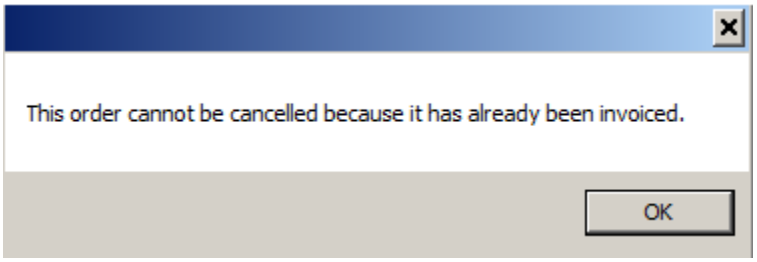
☑ User Cannot Cancel Sales Orders

the red CANCEL button does not show on the Sales Order screen:



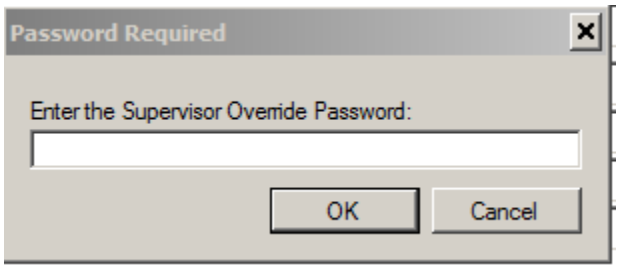

- **User Can Cancel Invoiced Sales Orders**

When this checkbox is NOT set, the following message will appear when a User attempts to cancel an invoiced sales order:




If this checkbox is set the invoiced sales order can be CANCELLED using the Supervisor Password:

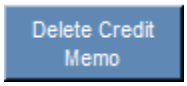


- **User can Delete Credit Memos**

  ☑ User Can Delete Credit Memos

  A User with this checkbox can access credit memos and a button will appear to "Delete Credit Memo" from the System. There is no audit trail with this action.

- **Only allow printing options in Recipe Portal**

  This applies to our bouquet recipe portal only. The user logged in will not have the print button visible to print documents:

Personal Information Tab:

There are only 3 required fields on this screen:

- Nick Name – allows an alias to be printed on the customer invoice
- Initials – used on screens and reports
- E-mail Address – two specific uses:
  - A SMARTSystem option can be set to use the User's email as the FROM address when emailing an invoice, price list, etc. This feature is set as follows:

    Control Info > Options > General Options

    ☑ Use Sales Rep Email as From Address

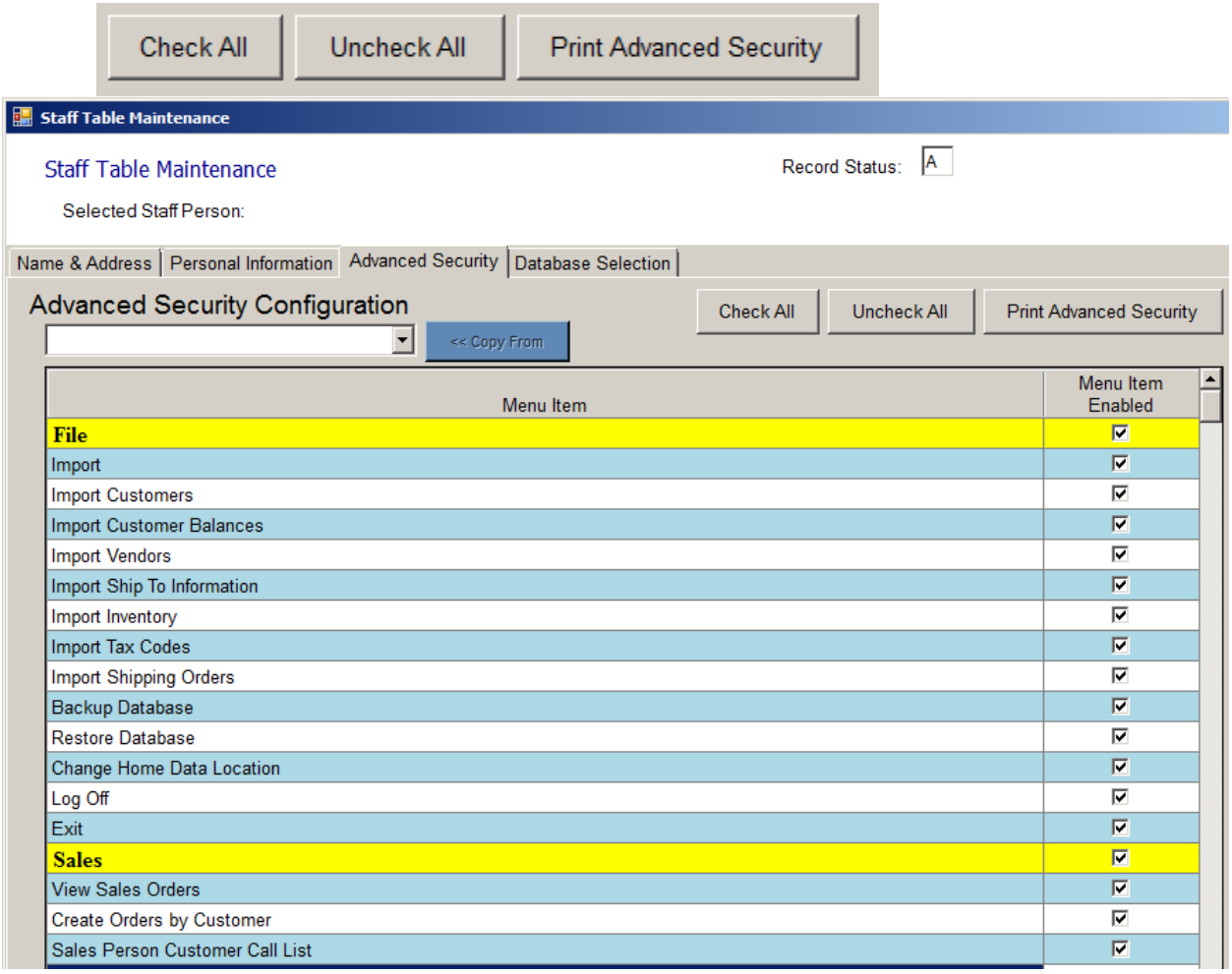
  - This is used with your integrated e-Commerce website to notify the sales rep that an order was placed on the website by their customer.

## Advanced Security Tab:

User access to the Menus and Sub-menus is defined under the Advanced Security.

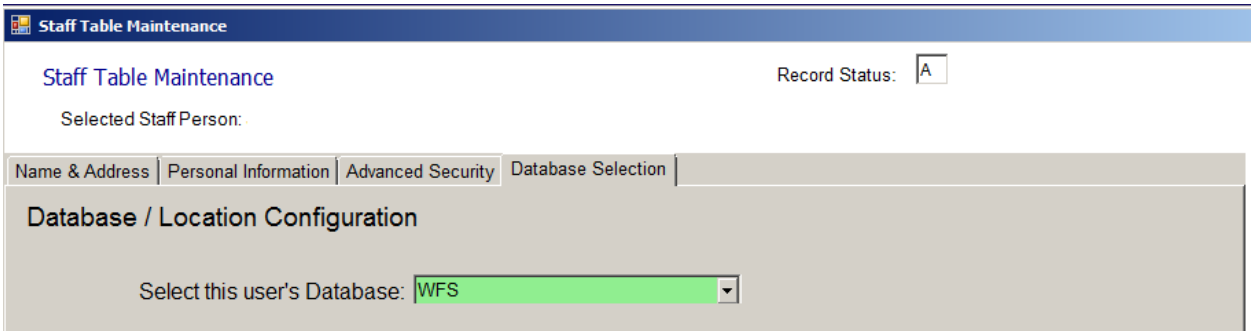
The yellow highlighted line represents the main MENU items on the menu bar. When unchecked all the items under it are not available.

All menus and sub-menus can be checked by clicking Check All. Uncheck All will remove all menus and sub-menus. You must check which ones this user has access to when logged on.



Database Selection Tab:

When multiple branches exist, there may be multiple databases available. If there is more than one database available, this selection would be the default database this User is assigned to:




Now, continuing to review the main Menus from left to right we have:

## Master Menu Overview:

### File

This Menu should be restricted to senior staff. It provides sub-menus to import data, backup the database, restore the database, log off and exit.

You do not want anyone to restore the Database unless they know where the last backup is stored and why they are doing it. See the File Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| File | ☑ |
| Import | ☑ |
| Import Customers | ☑ |
| Import Customer Balances | ☑ |
| Import Vendors | ☑ |
| Import Ship To Information | ☑ |
| Import Inventory | ☑ |
| Import Tax Codes | ☑ |
| Import Shipping Orders | ☑ |
| Backup Database | ☑ |
| Restore Database | ☑ |
| Change Home Data Location | ☑ |
| Log Off | ☑ |
| Exit | ☑ |

**Sales**

The screen below represents the Sales Menu items that are available.

The Sales Menu will provide access to all sales related functions. Prior to entering a sales order there are pre-requisites required, such as, entering your sales staff, assigning staff to your customers, establishing terms, etc.

The sub-menu items at the bottom of the Sales Menu that have "(Inquiry)" are for your sales staff with limited access to your information. This "Inquiry" only program will allow a User to view information, but not change it.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Sales Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Sales** | ☑ |
| View Sales Orders | ☑ |
| Create Orders by Customer | ☑ |
| Sales Person Customer Call List | ☑ |
| View Standing Orders | ☑ |
| Inventory At a Glance | ☑ |
| Shipping Order Entry | ☑ |
| Sales Order Entry | ☑ |
| View Invoices | ☑ |
| View Credit Memos | ☑ |
| Invoicing | ☑ |
| Create Credit Requests | ☑ |
| Print Consolidated Pick Tickets | ☑ |
| Sales Document Processing | ☑ |
| Print Consolidated Customer Invoices | ☑ |
| Sales Document Processing for SMARTtruck ™ | ☑ |
| Customer Lookup (Inquiry) | ☑ |
| Customer Sales History (Inquiry) | ☑ |
| Inventory Lookup (Inquiry) | ☑ |
| Volume Discounts Lookup (Inquiry) | ☑ |
| Pre-Book Allocations Lookup (Inquiry) | ☑ |
| View Open Order Item Details | ☑ |
| Log Off | ☑ |

## Purchase Orders

The screen below represents the Purchase Order Menu items that are available.

The Purchase Order Menu will provide access to all buying related functions. Prior to entering a purchase order there are pre-requisites required, such as, establishing vendors, vendor farm codes for selective selling, buyers, ship via, etc.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Purchase Order Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Purchase Orders** | ☑ |
| View Purchase Orders | ☑ |
| View Standing Purchase Orders | ☑ |
| PO Entry and Receiving | ☑ |
| PO Types | ☑ |
| View Incoming Availability | ☑ |
| Unallocated Pre-Book Item List | ☑ |
| Purchase Order Document Processing | ☑ |
| Print Receiving Labels | ☑ |
| Warehouse Receiving | ☑ |
| Tags | ☑ |
| Groups | ☑ |
| Verify PO Report | ☑ |
| Vendors | ☑ |
| Buyers | ☑ |
| Ship Via | ☑ |
| Drop Ship/Ship To | ☑ |
| Process Cargo Agent Inventory Receiving Data | ☑ |

## Vendors

There are certain pre-requisites that are required for vendor information to function smoothly. These pre-requisites include: vendor type, terms, ship via, state and country tables.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Vendor Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Vendors** | ☑ |
| Vendor View | ☑ |
| Vendor Entry | ☑ |
| Vendor Type | ☑ |
| Vendor Terms | ☑ |
| Farm Entry | ☑ |
| Ship Via | ☑ |
| 1099 Type | ☑ |
| Synchronize Vendors | ☑ |

## Customers

There are certain pre-requisites that are required for customer information to function smoothly. These pre-requisites include: salesperson, customer type, terms and ship via.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Customer Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Customers** | ☑ |
| Customer View | ☑ |
| Customer Entry | ☑ |
| Synchronize Customers | ☑ |
| Customer Types | ☑ |
| Customer Terms | ☑ |
| Ship Via | ☑ |
| Drop Ship/Ship To | ☑ |
| Contact's Job Title | ☑ |
| Customer Groups | ☑ |
| Carrier Locations | ☑ |

## Staff

The Staff Menu was already reviewed above.

| Menu Item | Menu Item Enabled |
|---|---|
| **Staff** | ☑ |
| Staff Entry | ☑ |
| Division | ☑ |
| Territory | ☑ |

## Inventory

There are certain pre-requisites that are required for inventory information to function smoothly. These pre-requisites include: product type, product category, product item, product size, product color, unit of measure, etc.

The items on this menu below "Hold List Processing" apply to a SMARTSystem configuration for bucket truck operations.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Inventory Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Inventory** | ☑ |
| Inventory Receiving | ☑ |
| Inventory View | ☑ |
| Inventory In-House View | ☑ |
| Inventory Entry | ☑ |
| Percent of Inventory Report | ☑ |
| View Inventory Pictures | ☑ |
| Inventory Count / Adjustments | ☑ |
| Inventory Reconciliation | ☑ |
| View Open Order Details | ☑ |
| Internal Inventory Transfer | ☑ |
| Inventory Transfer Request | ☑ |
| Synchronize Inventory | ☑ |
| Price Label Maker | ☑ |
| Retail Price Label Maker | ☑ |
| View Incoming Availability | ☑ |
| Wet-Dry Scanning | ☑ |
| Product Filter Maintenance | ☑ |
| Product Type | ☑ |
| Product Category Filter | ☑ |
| Product Sub-Category Filter | ☑ |
| Product Size Filter | ☑ |
| Product Color Filter | ☑ |
| Unit of Measure View | ☑ |
| Unit of Measure | ☑ |
| Item Classification | ☑ |
| Item Location | ☑ |
| Physical Inventory | ☑ |
| Buyer | ☑ |
| Vendor | ☑ |
| Hold List Processing | ☑ |
| Hold List for Sales and Pre-Sales | ☑ |
| Reconcile Products On Hold | ☑ |
| Route Pick List | ☑ |
| Hold List Details | ☑ |
| Smithers Pack Maintenance | ☑ |

## Shipping

The Shipping function provides solutions for warehouse operations to maintain better control.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Shipping Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Shipping** | ☑ |
| Warehouse Order Management | ☑ |
| Carrier Manifest | ☑ |
| Ship Via | ☑ |
| Unit of Measure | ☑ |
| Internal Transfer - Shipping | ☑ |
| Internal Transfer - Receiving | ☑ |
| Hand Helds | ☑ |
| Hand Held Data Manager | ☑ |
| Hand Held Returning Data | ☑ |
| Print Payment Summary | ☑ |
| Print Transaction Logs | ☑ |
| View Pre-Book Allocations | ☑ |
| Tags and Groups | ☑ |
| Warehouse Inventory and Labeling | ☑ |
| Send Armellini EDI Data | ☑ |
| Route Report | ☑ |
| Route Report for Packing | ☑ |
| Cargo Agent Order Processing | ☑ |
| Pull Sheet | ☑ |
| Pull Sheet Recap | ☑ |
| Load List | ☑ |
| Load List Recap | ☑ |
| Fuel Surcharges Maintenance | ☑ |
| Freight Cost Maintenance | ☑ |
| Route Bill of Lading | ☑ |
| Box Reports | ☑ |
| GTIN | ☑ |

## Reports

There are seven areas of reporting which consist of additional sub-menus:

- Sales Reports
- Purchasing Reports
- Inventory Reports
- Grower Reports
- Management Reports
- Labels
- SMART Mobile Suite

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Reports Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Reports** | ☑ |
| Sales Reports | ☑ |
| Invoice Register by Delivery Date | ☑ |
| Invoice Register By Route | ☑ |
| Sales Person Performance | ☑ |
| Sales By Customer Sales Person | ☑ |
| Sales by Sales Person Category | ☑ |
| Salesperson Sales by Category | ☑ |
| Credits By Customer Sales Person | ☑ |
| Credit Returns Summary By Product | ☑ |
| Sales Person Customer Call List | ☑ |
| Price List | ☑ |
| Detail Price List | ☑ |
| Sales Summary by Customer | ☑ |
| Todays Sales Orders | ☑ |
| Customer Sales History | ☑ |
| Sales History Comparison Report | ☑ |
| Customer / Product Variance Report | ☑ |
| Sales by Product | ☑ |

| | |
|---|---|
| Sales by Product | ☑ |
| Sales by Purchase Order | ☑ |
| Delivered Invoices by Sold To Zip Code | ☑ |
| Future Sales | ☑ |
| Product Sales By Customer / Date | ☑ |
| Product Sales By Date | ☑ |
| Product Sales With Total Units Received | ☑ |
| View Open Order Item Details | ☑ |
| Open Orders Report | ☑ |
| Standing Order Changes Report | ☑ |
| Key Performance Indicators | ☑ |
| Purchasing Reports | ☑ |
| Today's Margin By Item Report | ☑ |
| Margin By Item Report By Date | ☑ |
| Purchase Order Summary | ☑ |
| Purchase Order by Date Summary | ☑ |
| Future Requirements Report | ☑ |
| Future Inventory Requirements Report | ☑ |
| Inventory Buyers' Report | ☑ |

| Menu Item | Menu Item Enabled |
|---|---|
| Projected Inventory Status | ☑ |
| Sales History Buyers Report | ☑ |
| Projected Margins Report | ☑ |
| Receiving History Report | ☑ |
| Purchase Order Item Summary Report | ☑ |
| Buyer's Purchasing Report | ☑ |
| Buyer's Standing Orders Report | ☑ |
| Inventory Reports | ☑ |
| Inventory Count / Adjustments | ☑ |
| Inventory Cost Value Report | ☑ |
| Inventory Valuation | ☑ |
| Inventory Variance Report | ☑ |
| Inventory Adjustments | ☑ |
| Stock Status Report | ☑ |
| Inventory Gross Profit Report | ☑ |
| Pricing Margin by Item Report | ☑ |
| Canadian Inventory Valuation | ☑ |
| Product Committed Status Report | ☑ |
| Future Inventory Status | ☑ |

| Menu Item | Menu Item Enabled |
|---|---|
| Future Inventory Status Comparison | ☑ |
| Percent of Inventory Report | ☑ |
| Product Aging Report | ☑ |
| Shipping Reports | ☑ |
| Freight Report | ☑ |
| Freight/Drayage Report | ☑ |
| FOB Report (Freight on Board) | ☑ |
| FOB by Product Report | ☑ |
| Route Report for Packing | ☑ |
| Route Report | ☑ |
| Box Reports | ☑ |
| Grower Reports | ☑ |
| Grower Production Estimates | ☑ |
| Management Reports | ☑ |
| Customer Associations | ☑ |
| Customer Group Associations | ☑ |
| Compare QB Item List to Inventory Valuation | ☑ |
| Sales Tax by State | ☑ |
| Alternate Sales Rep Report | ☑ |

| Menu Item | Menu Item Enabled |
|---|---|
| Labels | ☑ |
| Price Label Maker | ☑ |
| Retail Price Label Maker | ☑ |
| Free Form Labels | ☑ |
| Bar Code Labels | ☑ |
| DPC Barcode Labels | ☑ |
| Product Box Labels | ☑ |
| Safeway Labels | ☑ |
| Print Shelf Tags | ☑ |
| Print Receiving Labels | ☑ |
| Custom Delivery Label | ☑ |
| Print Shelf Barcode Labels | ☑ |
| Batch Price Label Printing | ☑ |
| Price Label Maker w/Volume Discounts | ☑ |
| Custom Label Designer | ☑ |
| SMART Mobile Suite | ☑ |
| SMART Order Reconciliation | ☑ |

## Management

This function provides menu items that are normally managed by supervisory staff.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Management Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Management** | ☑ |
| Inventory Management | ☑ |
| Sales Price Maintenance | ☑ |
| Alternate Shippers | ☑ |
| Country/Region Box Rates | ☑ |
| Country/Region Table Maintenance | ☑ |
| Country/Region Purchase Cost % | ☑ |
| Supervisor Override | ☑ |
| Update Currency Conversion Rates (Candian Mode Only) | ☑ |
| Transfer Prices | ☑ |
| Volume Discounts | ☑ |
| Web Discounts (Promo Codes) | ☑ |
| Discount Price Code Maintenance | ☑ |
| Sales Order Group Maintenance | ☑ |
| Assign Inventory GL Accounts | ☑ |
| Assign Units Of Measure to Inventory | ☑ |
| Assign Item Classifications to Inventory | ☑ |
| Assign Categories to Inventory | ☑ |
| Assign Sub-Categories to Inventory | ☑ |

| Menu Item | Menu Item Enabled |
|---|---|
| Assign Primary Vendors to Inventory | ☑ |
| Assign Vendor GL Expense Account | ☑ |
| Assign Product Types to Inventory | ☑ |
| Set No WAC Flag for Inventory | ☑ |
| Payment by Payment Type Report | ☑ |
| User Defined Searches | ☑ |
| Classification / Item List Maintenance | ☑ |
| Product Transfer Logs | ☑ |
| Product Transfer Discrepancies | ☑ |
| Reflag Invoices for Export to Accounting | ☑ |
| Turn OFF / ON Contract Pricing | ☑ |
| Web Inventory Management | ☑ |
| Website Holidays | ☑ |
| User Defined Queries | ☑ |
| Change Home Data Location | ☑ |
| Replace Customer Salesperson | ☑ |
| Replace Customer Ship Via | ☑ |
| Other Cash Report | ☑ |

## End-of-Day

The End-of-Day process will export information from your SMARTSystem to your accounting system which includes:

- New Customers or changes to customer information
- New Vendors or changes to vendor information
- New Inventory Items or changes to Inventory information
- Inventory Adjustments
- Received Purchase Orders
- Invoiced Sales Orders
- Sales Credit Memos

In your Staff Advanced Security, you make available to each User access to the programs you want. See the End-of-Day Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **End-of-Day** | ☑ |
| Invoice Print Verification | ☑ |
| Export Data to Accounting | ☑ |
| Ecuador IRS Document Processing | ☑ |
| Auto Hold for Pre Book Orders | ☑ |
| Branch / Driver Check-In | ☑ |
| End of Day Internal Invoice Printing | ☑ |

## Driver

Driver is for orders that are done via truck and can be used for mobile delivery.

| Menu Item | Menu Item Enabled |
|---|---|
| **Driver** | ☑ |
| Driver Book Assignment | ☑ |
| Driver Book Inquiry | ☑ |
| Driver Open Book Lookup | ☑ |
| Driver Invoice Processing | ☑ |
| Driver Check-in Entry | ☑ |
| Driver Check-in Summary | ☑ |
| Drive Check-in Reconciliation | ☑ |
| Invoice Summary Register Report | ☑ |
| Invoice Payment Register By Route Report | ☑ |

## POS

Point-of-Sale (POS) processing is optional and POS workstations require SMARTSystem configuration to operate in POS mode.

This POS program will provide for:

- A cash drawer
- Thermal receipt printer
- Bar Code Scanning of product
- Signature Pad that will capture and store the signature electronically
- Credit Card processing for payments

In your Staff Advanced Security, you make available to each User access to the programs you want. See the POS Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **POS** | ☑ |
| View Sales Orders | ☑ |
| Create Orders by Customer | ☑ |
| POS Sales Order | ☑ |
| View Invoices | ☑ |
| View Credit Memos | ☑ |
| POS Reports | ☑ |
| Payments/Refunds By Date | ☑ |
| Selective Payment/Refunds Summary | ☑ |
| Payments by Payment Type | ☑ |
| Invoice Payment Register | ☑ |
| Invoice Payment Register by Route | ☑ |
| POS Label Maker | ☑ |
| Transaction Log View | ☑ |
| Log Off | ☑ |

## Control Info

Control information should be restricted to only senior management staff. In addition, training for the System Control sub-menu option is required.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the Control Info Menu selection below:

| Menu Item | Menu Item Enabled |
|---|---|
| **Control Info** | ☑ |
| System Control | ☑ |
| G/L Accounts | ☑ |
| States / Provinces | ☑ |
| Tax Code Maintenance | ☑ |

## HELP

The Help Menu will provide documentation and operational tools to help you manage your PC better.

In your Staff Advanced Security, you make available to each User access to the programs you want. See the HELP Menu selection below:

| | |
|---|---|
| **Help** | ☑ |
| About | ☑ |
| Help Topics | ☑ |
| Arrange Windows | ☑ |
| Cascade Windows | ☑ |
| Tile Windows | ☑ |
| CPU Monitor | ☑ |

The HELP Documentation can be accessed directly in the SMARTSystem by selecting the HELP menu or pressing the F1 key on any program screen.

## Questions and Answers

If you have any questions or need support, please contact us at Support@Floralcomputer.com or call 727-483-5306 for assistance.

## Practice Drills

The purpose of a Practice Drill is to get you more familiar with the SMARTSystem and comfortable using it.

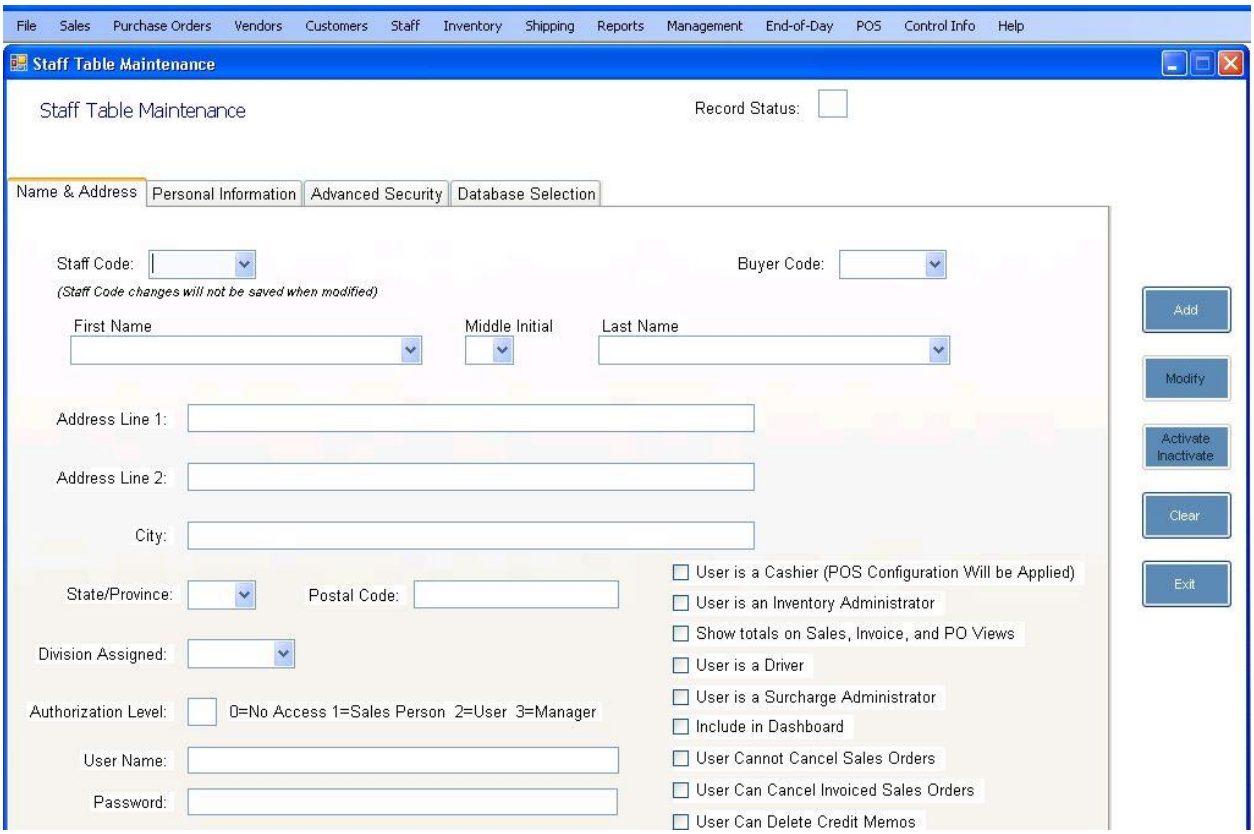
1. Login into SMARTSystem
2. Go to the STAFF Menu and select Staff Entry
   a. Select your Staff information and change your password
   b. Click “Modify” and Exit the program
   c. Exit the SMARTSystem using the red “X”

## How to Add Staff

1. In the file menu bar select the word "Staff" from the list.

2. In the drop down list under *Staff* choose "Staff Entry."

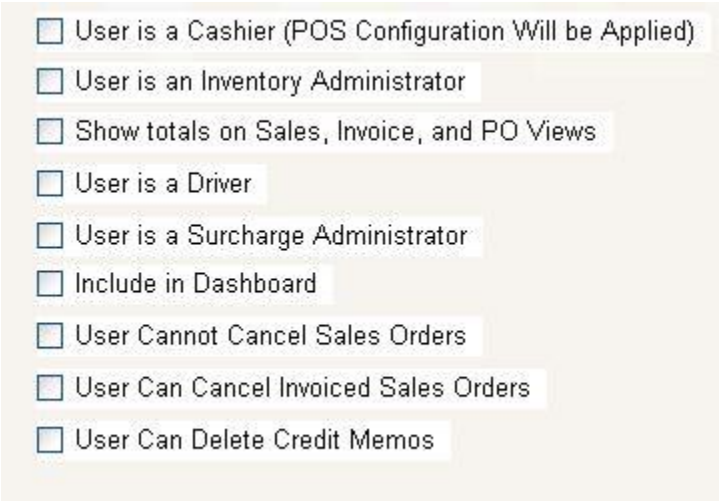
3. A pop up window entitled "Staff Table Maintenance" will open to the tab called "Name & Address."




4. Type the information for your new Staff entry.

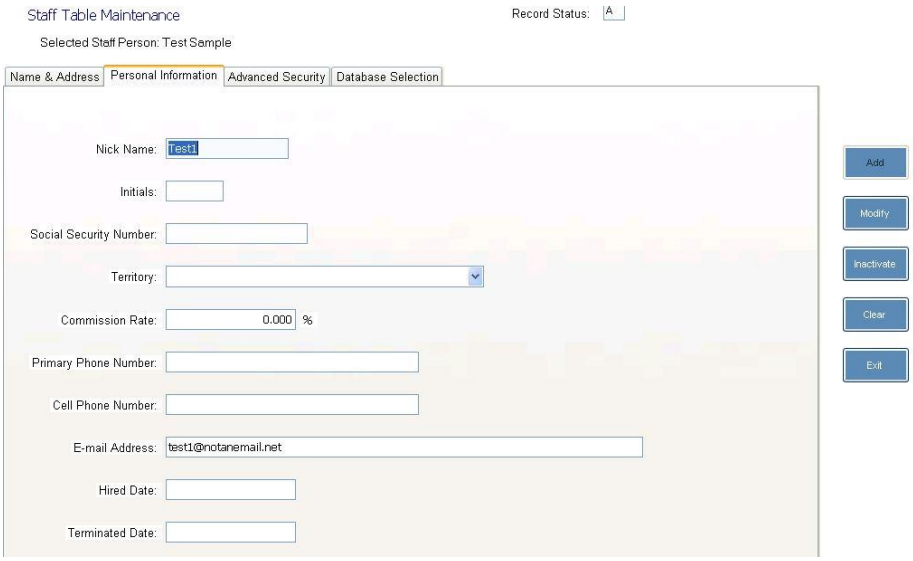
Staff Code must be entered before you can save your entry and move on to another staff entry. The Staff Code is any 1 through 5 letters, numbers or a combination of letters and numbers that you make up that help you to refer to your new Staff entry.

5. Required fields are Address, City, State, Division Assigned, Authorization Level.
6. Create a unique User Name and Password for the new staff entry.
7. In the lower right hand section of the Name & Address box is a list of optional items that may be checked to further designate your staff user.

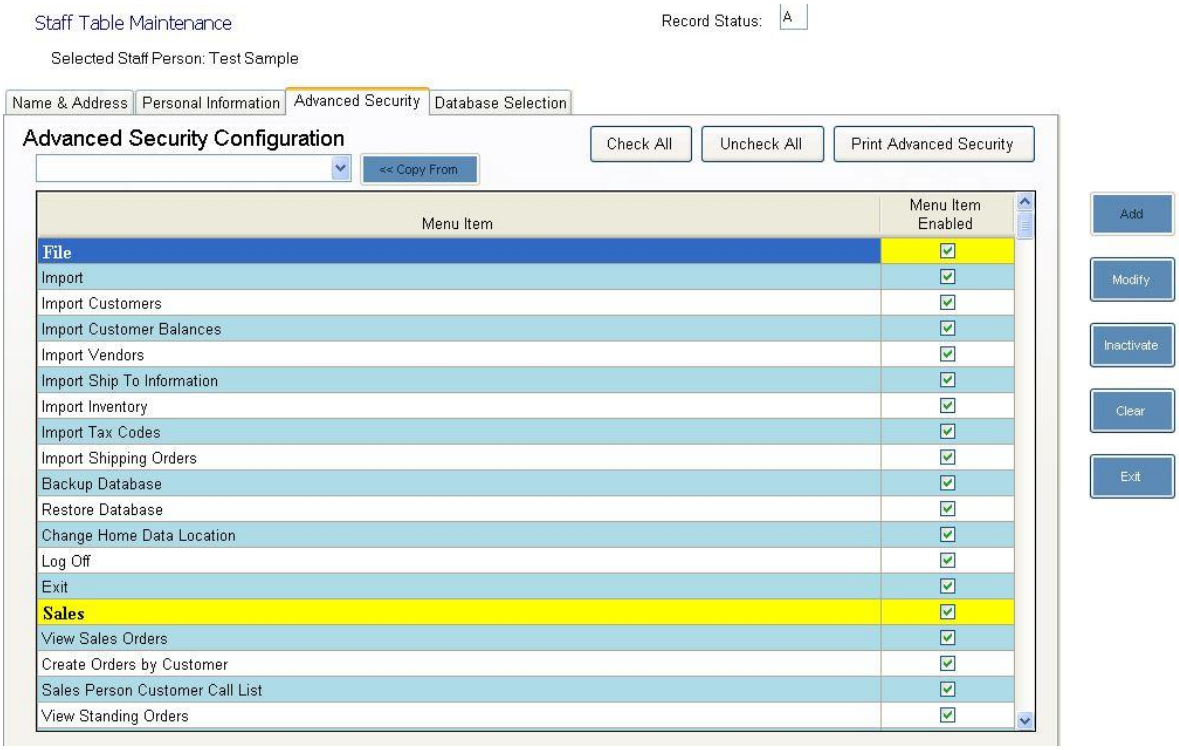



Check any of the boxes if needed.

8. Click the Add button. The “Personal Information” tab opens and the “Nick Name” field needs to be entered. It is highly recommended to add the email address of the staff entry.




*Please note that the Advanced Security Tab will already be populated with checked items for the default Authorization Level that you have chosen for the staff individual. Changes can be made to the authorizations of an individual staff member at any time by the staff administrator.



9. Click the Add button and your new staff entry is added.

Practice Drill Part 2 Check your work.

3. Login into the SMARTSystem with your User Name and new password
4. For the person responsible for entering and maintaining Staff, enter a new STAFF record or make one up. If you make up a name inactivate it.